

Joe Sullivan, CFP®

Sr. Sales Consultant, Advanced Markets



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Joe has experience in a number of financial planning subject matters.

Joe Sullivan joined the Transamerica Advanced Markets Group in 2019 after nearly nine years at Raymond James Financial where he worked as a Relationship Manager with mutual fund and annuity partners. Prior to entering the field of financial services, Joe spent over 15 years in the land development industry.

Joe is a Certified Financial Planner™ (CFP®) and currently holds the FINRA Series 7 registration. He has a passion for ensuring clients can maximize the financial opportunities available to them and does that by educating financial services professionals on advanced planning strategies.

Joe lives in St. Petersburg with his wife and two children. When he is not working, he enjoys challenging himself in varying pursuits such as wood working and running.

About Joe:

- 9 years of financial services experience
- Joined Transamerica in 2019
- Certified Financial Planner™
- Bachelor of Science in Business Administration, University of Florida

Contact Joe:



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transamericaadvancedmarkets.com

Our Mission: Connecting Wealth + HealthSM

Transamerica is leading the charge to champion the connection between Wealth + Health. People want to live long, healthy lives with the financial means to do so. They're concerned about healthcare costs, retirement readiness, and protecting their family's quality of life. We're committed to helping them prepare for every part of that future — because a sound financial strategy is about more than dollars and cents. After all, what good is wealth if you're not healthy enough to enjoy it?

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